

# INSTRUCTIONS

## How to Apply

### 1. Read all Program rules and Terms and Conditions on:

- The back page of this document
- The Application (Pre-Approval Form and Rebate Application Form)

### 2. Energy Audit/Design Review

- Retrofits: In most cases, an energy audit is recommended and may be required.
- New Construction/Additions: An energy design review will typically be required.
- Upon completion of the project, the incentive can be increased up to 10% to cover costs of an approved audit/design review which recommended the installed measures.
- Contact the Utility to determine if your project requires an audit or design review.

### 3. Complete Pre-Approval Form

- Provide Customer, Facility, project and Measure Information on the Application.
- Provide Estimated Savings and Incentives:
  - Provide necessary documentation to support the energy usage used for baseline and installed measures. This includes wattage, hours of operation, time of operation (hours, days) and any information needed to calculate energy and demand.
  - Provide manufacturer specification sheets for all equipment.
  - You can let the Utility complete this section. If so, you must provide documentation or equipment specifications that allow the Utility to estimate savings.
- Sign form and Terms and Conditions and submit with all supporting documents.

### 4. Pre-Approval Process

- For retrofit applications, the Utility must be given access to the facility to examine existing equipment being replaced.
- The Utility may request further documentation as deemed necessary and may require that equipment be monitored for energy use before and after measures are installed.
- If pre-approved, funds covering the estimated incentive payment will be reserved for your project for up to 18 months.
- The Utility may, at its discretion, establish a shorter or longer reservation period for specific projects. The expiration dates may be extended, subject to Utility approval.

### 5. Start and Complete Project

### 6. Complete Rebate Application Form

- Contact the Utility first to ensure you complete the most current application form.
- Submit final Rebate Application Form within three (3) months of project completion.
- Final Approval and Payment: The Utility must be given access to the facility to verify and qualify the final project installation before the incentive payment is dispersed.

## Project Qualification

Energy use of equipment meeting Iowa Energy Code requirements, Federal standards or generally accepted industry standards may be used to determine baseline usage. The Utility may assign different baselines than those provided and adjust estimates accordingly. In some cases, if equipment is retired solely for efficiency gains (early retirement) the existing equipment can be used as a baseline. Equipment monitoring may be required.

Equipment and measures that qualify under other prescriptive incentive programs offered by the Utility and projects under \$5,000 will not qualify for a custom incentive.

**Submit Application  
and documents to  
your Utility  
Representative or  
mail to:**

Southwest Iowa Rural  
Electric Cooperative  
1801 Grove Ave.  
Corning, IA 50841

### Questions?

Contact:  
888-220-4869

## Terms and Conditions - Non-Residential Custom Incentive Program

**Program Offer:** The Program covers products purchased and/or services rendered on or after **January 1, 2025**.

The Customer and Project Sponsor, as identified on the Custom Incentive Program Application form, agree to the following terms and conditions ("the Agreement"):

Rebates shall be pro-rated based on the percent of power supplied by the utility if the customer has distributed generation.

The Customer shall meet all Custom Incentive Program (Program) eligibility requirements as stated in the Agreement and the Application (Custom Incentive Pre-Approval Application and Rebate Application forms) and the appropriate attachment(s). The Utility reserves the right to determine eligibility for the Incentive.

Both funding and the conditions of the Program are subject to modifications. If there are changes in the Incentive, the Utility will attempt, but cannot guarantee, to provide a reasonable period of time before changes go into effect.

If the incentive is modified in any way, the Agreement shall be revised or terminated as appropriate with such change.

Eligibility for this program may require inspections and measurements of the performance of the installed measures. Therefore, Customer agrees to provide access to the Project Site for these purposes to the Utility and/or its agents or assigns. For Retrofits, the Utility must be allowed to inspect and approve the project prior to the removal of the existing equipment/systems and the installation of the measures.

Energy savings for which incentives are paid must represent a reduction in energy supplied by the Utility. Savings from non-Utility supply, such as wind, cogeneration or deliveries from another supplier, do not qualify for an incentive.

Installation of energy efficient equipment required for compliance with the lowa Energy Code will not qualify for incentives. Any improvements beyond Code requirements or a generally accepted industry standard, where applicable, may be eligible for incentives.

Customer shall not apply for or receive incentives offered by another Utility program, local or state entities or other utilities for measures covered under this Agreement (excluding tax credits).

The Utility may suspend or terminate the Agreement, without cause, upon written notice to the Customer. If the Agreement is terminated for any reason, the Utility shall not be liable to the Customer for damages or compensation of any kind.

### Incentives:

The Utility finalizes the incentive amount after completing the project approval process. The total incentive cannot exceed 50% of the total project cost and the total site incentive (including prescriptive rebates) cannot exceed \$100,000. An adjustment may be made by the Utility after a review of the proposed measures and assumed baselines. The actual incentive amount may therefore vary from the submitted amount.

Funding for this program is limited. The incentive is subject to the availability of authorized funds and will be paid on a first-come, first served basis to qualified Customers. Funds will only be reserved upon approval of the Pre-Approval Application form.

### Project Sponsor:

Upon project approval, the Project Sponsor agrees to deliver energy and/or demand savings resulting from the installation of these measures at the project site. Any contracts and correspondence will be sent directly to the Project Sponsor.

If self-sponsoring this project, Customer assumes the role and responsibilities of the Project Sponsor.

### Customer and Project Sponsor agree:

Project Sponsor has obtained the permission of the legal owner of the Project Site to install the measures or has authority to contract, on behalf of the legal owner of the Project Site, for installation of the energy efficiency measures.

The Utility makes no representation about the Project Sponsor's qualifications. The Customer is solely responsible for selecting the Project Sponsor. The Project Sponsor is an independent contractor and is not authorized to make any representations on behalf of the Utility. The Utility will have no role in resolving any disputes between Customer, Project Sponsor, and/or any other third parties.

### Warranty Information:

The Utility makes no warranties, expressed or implied, and assumes no liability with respect to safety, performance, equipment operation, material workmanship, manufacturing or design related to the measures installed for this program. The Utility does not guarantee that a certain level of energy or cost savings will result from the use of products covered by this program.

### Limitation of Liability:

Customer shall release the Utility, its affiliates, subsidiaries, officers, managers, directors, agents, and employees from all claims, demands, losses, damages, costs, expenses, and liability (legal, contractual, or otherwise) which are in any way connected with the Project, including any third party's performance or failure to perform the Project, however caused.

The Customer agrees that the Utility's liability in connection with this Program is limited to paying the Program Incentive specified (when all program requirements have been satisfied). Under no circumstances shall the Utility be liable for any consequential or incidental damages resulting from participation in this Program.

### Other Conditions:

**Customers must apply for rebates within six (6) months of the purchase date (as shown on the Customer's invoice) and are subject to the current year program offer if received after January 31st.** Past eligibility, however, does not guarantee that equipment will meet criteria for current programs in effect.

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### Sign Below and Submit this Agreement with the Pre-Approval Approval Form

I have read and understand and agree to the rules, requirements and terms and conditions of the Agreement and Application and all attachments. The information supplied on the Application and any attachment(s) is true and accurate to the best of my knowledge.

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**Project Sponsor Signature**

Date

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**Customer Signature (company representative)**

Date

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## Commercial Custom Program

**PRE-APPROVAL APPLICATION (submit BEFORE installing any equipment/measure)** Page 1 of 2

**Customer Information** Check if wind or solar generation is installed.

Company		Account Number	Phone	
Mailing Address		City	State	Zip Code
First Name (contact person)	Last Name	Email Address		

**Facility Information (project location)** Check if same address as above:

Company/Project Site Name		Facility Account Number	Phone	
Mailing Address (if different than mailing address above)		City	State	Zip Code

ACCOUNT TYPE:  Farm       Commercial/Industrial  
 Business       Apartment Bldg/Unit

Hours of Operation: Mon-Fri \_\_\_\_\_ to \_\_\_\_\_  
 Please indicate AM/PM      Saturday \_\_\_\_\_ to \_\_\_\_\_  
 Sunday \_\_\_\_\_ to \_\_\_\_\_

GENERAL BUSINESS DESCRIPTION: \_\_\_\_\_

YEAR BUILDING BUILT \_\_\_\_\_ BUILDING AREA (sq. ft.) \_\_\_\_\_

**Project Information**

TYPE OF PROJECT:  New Construction/Addition     Retrofit EXPECTED COMPLETION DATE:

Provide all information below that is applicable for this project. Please check the box next to the firm that will serve as the project sponsor (primary point of contact for the Utility). If the Customer wishes to be the primary point of contact please check here: Self-Sponsor

ENGINEERING FIRM (responsible for equipment specification): \_\_\_\_\_ Project Sponsor

Business Name	Address	City	State	Zip Code
Contact Name	Phone	Email Address		

EQUIPMENT VENDOR: \_\_\_\_\_ Project Sponsor

Business Name	Address	City	State	Zip Code
Contact Name	Phone	Email Address		

Other (identify type of firm): \_\_\_\_\_ Project Sponsor

Business Name	Address	City	State	Zip Code
Contact Name	Phone	Email Address		

Other (identify type of firm): \_\_\_\_\_ Project Sponsor

Business Name	Address	City	State	Zip Code
Contact Name	Phone	Email Address		

Equipment and measures that qualify under other prescriptive incentive programs offered by the Utility and projects where the estimated incentive is under \$5,000 will not qualify for a custom incentive.

**Page 2 of this form must also be completed. Submit Pre-Approval Application with a signed Agreement (Terms and Conditions page).**

**Customer and Project Sponsor Agreement**

By signing below, Customer and project sponsor agree to all requirements and the Terms and Conditions provided for this program.

Customer Name/Title		Project Sponsor Name/Title	
Customer Signature	Date	Project Sponsor Signature	Date

<b>Office Use Only:</b>	Utility ID	Notes:	Authorized Amount
	Employee Name		

# Custom Program

Company	Account Number	Project Sponsor
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**Project Details**

**MEASURE TYPES**

Use Measure Types as defined below to complete the information requested on this page. Use Nominal Incentives Rates (shown by measure type) to calculate the estimated incentives for each measure applicable to this project.

- AC:** Air conditioning equipment or measure that reduce air conditioning load in the facility.  
**Other:** Includes manufacturing and process equipment, process heating and refrigeration systems.

<i><b>NOMINAL INCENTIVE RATES*</b></i>	
AC	\$0.10 / kWh
Other	\$0.09 / kWh
All Measures	\$ / peak kW varies

**MEASURE INFORMATION**

Provide a brief description of each measure. Total project cost includes, but is not limited to, audits, design, engineering, materials, fees, overhead and labor. Must have separate measure entries for each measure type included in the project and provide costs for each measure.

Measure Number	Measure Type	Description of Proposed Measure	Measure Life (Years)	Estimated Cost of Retrofit
1				
2				
3				
4				
<b>Energy Audit/Design Review Cost (Enter "0" if not applicable)</b>				
<b>Total Project Cost</b>				

**ESTIMATED SAVINGS AND INCENTIVES**

Attach copies of energy audits and/or all supporting documents including calculations and assumptions used to determine the energy savings and demand reductions for measures shown below.

**Check here to have Utility complete this section:**

**Permanent On-Peak Demand Reduction\*\***

Measure # from above	Baseline Usage (kWh/yr)	Installed Usage (kWh/yr)	Energy Savings (kWh/yr)	Incentive Rate* (\$/kWh)	Energy Incentive (\$)	Baseline On-Peak Demand (kW)	Installed On-Peak Demand (kW)	On-Peak Demand Reduction (kW)	Peak Demand Incentive (\$)
1									
2									
3									
4									
<b>TOTAL</b>									

The total incentive cannot exceed 50% of the total project cost and the total site incentive (including prescriptive rebates) cannot exceed \$100,000. Projects with a payback of less than 2 years (with incentive included) will not qualify for custom incentives.

Adjustments may be made by the Utility after a review of the proposed measures and assumed baselines. If approved, funds for a project will be reserved for 18 months. A project may be extended at any time, subject to Utility approval.

Upon completion of the project, the incentive can be increased up to 10% to cover costs of an approved audit/design review which recommended the installed measures.

**\*Incentive rates are for typical applications and may vary by project. Rates may also vary with changes in the Utility's cost of service.**

**\*\*Demand reduction of equipment operating from 4-9 PM in July, subject to Utility adjustments to account for load diversity and other factors.**

<b>Office Use Only:</b>	Reservation Start Date:	Expiration Date (def. 18 mo.)
Notes:	Project Number:	
	Incentive Adjustment:	\$
	Reserved Incentive:	\$

# Commercial Custom Program

## REBATE FORM (submit AFTER project is completed)

Company	Account Number	Project Sponsor
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### Final Project Details

PROJECT COMPLETION DATE:

#### MEASURE TYPES

**AC:** Air conditioning equipment or measure that reduce air conditioning load in the facility.  
**Other:** Includes manufacturing and process equipment, process heating and refrigeration systems.

### MEASURE INFORMATION

Measure Number	Measure Type	Description of ACTUAL Measure Installed	Measure Life (Years)	Actual Costs
1				
2				
3				
4				

**Energy Audit/Design Review Cost (Enter "0" if not applicable)**

**Total Project Cost**

### ACTUAL SAVINGS AND INCENTIVES

**Check here to have Utility complete this section:**

#### Permanent On-Peak Demand Reduction

Measure # from above	Baseline Usage (kWh/yr)	Installed Usage (kWh/yr)	Energy Savings (kWh/yr)	Incentive Rate* (\$/kWh)	Energy Incentive (\$)	Baseline On-Peak Demand (kW)	Installed On-Peak Demand (kW)	On-Peak Demand Reduction (kW)	Peak Demand Incentive (\$)
1									
2									
3									
4									
TOTAL									

\*Use Incentive rates that have been agreed upon by the Utility for this project.

The total incentive cannot exceed 50% of the total project cost and the total site incentive (including prescriptive rebates) cannot exceed \$100,000. Projects with a payback of less than 2 years (with incentive included) will not qualify for custom incentives. Adjustments may be made by the Utility after a review of the proposed measures and assumed baselines.

### Attach the following and submit with this Application:

- Equipment specification and product information sheets
- Invoices for services, material and labor associated with the installed measures
- Results from actual energy measurements made before and after measures were installed
- Supporting documents with calculations and assumptions used to determine the energy usage and peak demand

I have read and understand and agree to the rules, requirements and terms and conditions of the Agreement and Application and all attachments. The information supplied on the Application and any attachment(s) is true and accurate to the best of my knowledge.

Project Sponsor Signature \_\_\_\_\_ Date \_\_\_\_\_

Customer Signature (company representative) \_\_\_\_\_ Date \_\_\_\_\_

<b>Office Use Only:</b> Utility ID	Notes:	Rebate Adjustment: \$
Employee Name		Total Incentive: \$